

Purchase Requisition Approval Status Report

Purpose: Use this job aid to generate a report for monitoring the approval status of a purchase requisition (PR).

1. Go to transaction code **ZMM8_EXTN**.
2. Complete the following fields or checkboxes:
 - a. **Purchasing Organization** – same as agency business area
 - b. **Purchasing Doc Creation Date** – date or range of dates the document line(s) was created
 - c. **Purchasing Group** – code represents a buyer or group of buyers responsible for an agency's purchasing activities. This field allows generation of purchase requisitions which contain undeleted line items with the desired purchase group.
 - d. **Document Type** – Select the type of purchasing document to display on the report (PR). Only one document type radio button can be selected.
 - e. **Report Options** –
 - i. **Approved Document** displays purchase requisitions that have all of the required approvals needed for the particular procurement scenario.
 - ii. **Document Needing Approval** displays purchase requisitions with at least one outstanding required approval for the particular procurement scenario.
 - iii. **Approved & Unapproved Document** displays all purchase requisitions correlating to the search criteria requested.
 - f. **History Log** – when checked, will include approval data for the life of the requisition, including new release strategy assignments. If not checked, displays only most recent release strategy approvals.

The screenshot shows the 'Purchasing Document Approval Status Report' form. Callouts A through F point to specific fields:

- A** points to the 'Purchasing Organization' field.
- B** points to the 'Purchasing Doc Creation Date' field.
- C** points to the 'Purchasing Document Created by' field.
- D** points to the 'Purchasing Group' field.
- E** points to the 'Report Options' section, specifically the radio buttons for 'Approved Document', 'Document Needing Approval', and 'Approved & Unapproved Document'.
- F** points to the 'History Log' checkbox.

NOTE: Use additional selection criteria as needed. The **Our Reference Code** field is not applicable to purchase requisitions.

3. Click the **Execute** button.

Purchasing Requisition Approval Status Report

Purchasing Document Approval Status Report																
Refresh																
Pur. Status	Doc Num...	Creator	Purchasing Grp	Selected Approver	Assign Date	Assi Time	Approver	Rel Co...	RelCode Desc	Status	Approval Date	Approval Time	Approval Duration	Pos'le App	Rel Date	Creation T
Approved	00076499	RFBUTO	470					25	Agency 10K -	AWAITING						
			470					25	Agency 10K -	AWAITING						
			470					25	Agency 10K -	AWAITING						
			470					25	Agency 10K -	AWAITING						
			470					25	Agency 10K -	AWAITING						
			470					25	Agency 10K -	AWAITING						
Approved	00076500	CSVOLL	470	EST-6722DHS	02/15/2017	15:45:36	TEST-672	25	Agency 10K -	APPROVED	02/15/2017	15:50:02	0 days, 00:42:06	REWHITAKER	02/15/2017	14:27:28
			470	EST-6722DHS	02/15/2017	15:50:02	TEST-672	R1	Agency 50K -	APPROVED	02/15/2017	15:59:04	0 days, 00:09:02	RLWILLIAMS		
			470	EST-6722DHS	02/15/2017	15:59:04	TEST-672	R3	Agency Proc.	APPROVED	02/16/2017	09:24:26	0 days, 17:25:22	RLYOUNG02		
			470	SI-AAHEMPHIL	02/16/2017	09:24:27		R5	DFA Intergov.	CANCELLED			7 days, 22:59:13	S1PARKINSON		
			470	SI-DRSMITH02	02/16/2017	09:24:27		R5	DFA Intergov.	CANCELLED			7 days, 22:59:13	SDMCKNIGHT		
			470	SI-MINGHUALI	02/16/2017	09:24:27		R5	DFA Intergov.	CANCELLED			7 days, 22:59:13	SDSULLIVAN		
			470	SI-RNGARNER	02/16/2017	09:24:27		R5	DFA Intergov.	CANCELLED			7 days, 22:59:13			
			470	EST-6722DHS	02/16/2017	09:57:38	TEST-672	R3	Agency Proc.	APPROVED	02/16/2017	11:03:49	0 days, 01:06:11			
			470	SI-DRSMITH02	02/16/2017	11:03:49	SI-DRSMIL	R5	DFA Intergov.	APPROVED	02/16/2017	11:26:05	0 days, 00:22:16			
			470	SI-RSUTLEY	02/16/2017	11:26:05	SI-RSUTL	R6	Dept of Info S	APPROVED	02/16/2017	11:53:04	0 days, 00:26:59			
			470	EST-6722	02/16/2017	11:53:05	TEST-6722	P6	DFA OSP	APPROVED	02/16/2017	13:37:39	0 days, 01:44:34			
			470	DLBELL	02/16/2017	13:37:40	DLBELL	R7	Governor's Of	APPROVED	02/16/2017	14:03:32	0 days, 00:25:52			
			C00	EST-6722F	02/15/2017	13:47:12	TEST-672	25	Agency 10K -	APPROVED	02/15/2017	14:17:06	0 days, 00:09:00			13:38:12
			C00	EST-6722F	02/15/2017	14:17:07	TEST-672	R2	Agency > 10	APPROVED	02/15/2017	14:24:08	0 days, 00:29:54			
			C00	EST-6722F	02/15/2017	14:24:08	TEST-672	R3	Agency Proc.	APPROVED	02/15/2017	14:34:12	0 days, 00:07:01			
			C00	EST-6722F	02/15/2017	14:34:13	TEST-672	R4	Agency Direc.	APPROVED	02/15/2017	14:43:23	0 days, 00:10:04			
			C00	SI-MINGHUALI	02/15/2017	14:43:24	SI-MINGH	R5	DFA Intergov.	APPROVED	02/15/2017	15:13:28	0 days, 00:09:10			
			C00	SI-SDHULSEY	02/15/2017	15:13:28	SI-SDHUL	R6	Dept of Info S	APPROVED	02/16/2017	09:14:43	0 days, 00:30:04			
			C00	EST-6722C	02/16/2017	09:14:43	TEST-672	P6	DFA OSP	APPROVED	02/16/2017	09:22:41	0 days, 18:01:15			
			C00	SI-BELL02	02/16/2017	09:22:42	DLBELL02	R7	Governor's Of	APPROVED	02/16/2017	09:35:02	0 days, 00:07:58			
			C00	SI-BELL02	02/16/2017	09:22:42	DLBELL02	R7	Governor's Of	APPROVED	02/16/2017	09:35:02	0 days, 00:12:20			

- Refresh** button – updates data with any changes since the initial report execution.
- Purchase Document Status** identifies the status of the whole purchase requisition.
 - Approved** indicates all necessary document approval levels have been completed.
 - Need Approval** indicates all necessary document approval levels have not been completed.
- Creator** always displays the AASIS ID of the person who initially created the purchase requisition.
- Purchasing Group** displays the assignment of the **1st undeleted line at the time of PR creation**. If the purchasing group is changed after it is saved initially, the report will show what it was at creation. If multiple lines exist on a PR with different purchasing groups, only the purchasing group from the 1st line item will display in this column.
- Selected Approver** lists all users that have been assigned the Approval Task for that release code. These users will have received notification that approval is needed.
- Status** identifies the status of the release codes' particular authorization level.
 - Approved** indicates the document was approved for that particular authorization level.
 - Awaiting Assignment** indicates the previous workflow has not been completed. Upon completion, AASIS automatically routes the workflow for the next approver needed.
 - Cancelled** indicates the workflow was cancelled at the previous release code level. The level that was actually cancelled will display in "Not Approved" status.
 - No Approver Found** indicates no users were assigned an approval task at that authorization level.
 - Not Approved** indicates approval workflow has been assigned but is not complete.
 - Rejected** indicates an approver has rejected the requisition approval and all existing workflow has been cancelled for that document. If changes follow, a new release strategy may be assigned if the change affects the material group, total value or total projected cost of the requisition.
- Approval Duration** displays the total time from assignment through approval for a particular approver.
- Possible Approvers** displays users that may be selected as an approver by the requisition creator. This column is only applicable for the first release of the requisition.
- Release Creation Date** identifies the date the latest release strategy was assigned. This date will change each time a new release strategy is created for the document.
- Purchasing Org.** displays the name of the purchasing organization.
- Document Creation Date** always identifies the date the original purchase requisition was created.